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## Integration Partner Integration Support & Transition Achievement Report (Deliverable 153.1.1d) March 2004

### **Executive Summary**

Integration Partner supports FSA's leadership and the actions required to drive the development of integration projects and initiatives. This report summarizes Integration Partner's activities for the month of March that support the development of integration projects and initiatives.

Major accomplishments for the month include those accomplishments that support FSA's Business and Technology Integration Group (BTIG). Integration Partner worked with the FSA business and technology owners to address the following:

- Reshape current enterprise business objectives and draft enterprise design principles
- Continue to develop enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities
- Continue to provide input into Integration planning activities; the March activities were focused on informing the presentation to the Management Council on the topic of Integration
- Discuss next steps for Integration Partner transition activities to the new vendor (upon award)

Enterprise gaps that may have an effect on FSA's integration program are summarized on page four. In summary, the gap identified focuses on the need for Integration Partner and FSA to work together to ensure that staging environments at the VDC are in synch with production environments and therefore usable for the migration of new integration systems.

### **Overall Value Delivered**

#### Integration Progress

The following synopses outline progress towards major integration initiatives within the Integration Partner program, including Application & Delivery, Enterprise Data Strategy and Integrated Partner Management (IPM).

#### **Application & Delivery**

- Common Origination & Disbursement (COD) will continue to build upon the existing COD solution that provides FSA with a core, single integrated solution to manage aid originations and disbursements.
- COD Release 3.0 was successfully implemented into production on March 14. Release 3.1 is currently scheduled for a July 2004 implementation; development efforts are underway. Requirements gathering for Release 4.0 (2005-2006 annual cycle) has begun.
- The Integration Partner team helped FSA prepare for and participated in FSA's Spring Conference.

#### **Enterprise Data Strategy**

- The Enterprise Data Strategy Phase II task order is providing further analysis on the following areas:
  - FFEL / student data enrollment data reporting options
  - Website and portals consolidation options
  - Shared services implementation options
  - Impact of CSB procurement outcome
  - Financial transaction processing options
  - Enterprise analytics support architecture options

The end result of this task order will be a more detailed overall enterprise-wide data framework that integrates the components listed above, as well as a functioning XML management tool and support of an active data quality management process for FSA.

- Work with FSA to increase the Data Strategy II scope to include analysis related to additional CPS/ISIR files and identify associated candidate XML schemas.
- Completed the XML Registry Logging and Statistics design document, wireframes for XML Registry enhancements and high-level designs for the XML Registry enhancements for inclusion in the May release.
- Reviewed and finalized XML Registry enhancements and requirements for inclusion into the May production release.
- Delivered the XML Core Components Dictionary Release 2.0
- Conducted working sessions with the Technical Strategies and Gaps Analysis working groups.

### **Integrated Partner Management**

- The IPM Gaps Analysis task order addressed any gaps or remaining aspects within the IPM framework that have yet to be identified, resulting in end-to-end business requirements for an overall IPM solution. Final deliverables were submitted to FSA, and the task order has concluded in March.
- The eZ-Audit team is currently focused on development activities related to Release 2.0. This release will support upcoming audits, fixes to the PEPS interface, school group fixes and other enhancements to the current eZ-Audit.
- The Identity and Access Management Tools Analysis task order will seek to understand how available Identity and Access Management technologies and tools can help achieve FSA business objectives. The task order will enable FSA to explore vendor products and their suitability for addressing FSA requirements.
- During the month of March, the Identity and Access Management team helped FSA make a decision on the prototype product selection. Product options were submitted to FSA on March 12. The team is working with ITA to establish the prototype development environment.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status and a Program Scorecard that reflects project variances from the previous reporting month that focuses on the Task Order, Scope, Schedule, Cost, Quality and Overall variances. Most projects are on schedule and have no significant issues. The Enterprise Data Strategy task order must continue to be monitored carefully

to ensure there is no schedule slip as a result of the delayed award. The eZ-Audit team continues to work under an ATP, which impacts the Program Scorecard in the area of Task Order. Refer to the attached March Bi-Weekly Status Reports, Bi-Weekly Status Report 03-15-04.pdf and Bi-Weekly Status Report 03-26-04.pdf.

#### Participation in FSA Business Integration & Technology Group

The Integration Partner provides business, technical and integration support to FSA's Business Integration and Technology Group. Integration Partner provides this group with the following:

- Vision analysis, facilitation and establishment,
- Coordination and alignment of the Integration Partner program with overall program vision,
- Agenda management and meeting coordination,
- Management of the enterprise sequencing plans, and
- Facilitation of major integration dependencies, risks and issues.

During the month of March, Integration Partner worked with the BTIG to reshape current enterprise business objectives and draft enterprise design principles. The continued reshaping efforts will result in updated enterprise artifacts. In addition, Integration Partner continued to develop enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities and provide input into Integration planning activities. The March activities were focused on informing the presentation to the Management Council on the topic of Integration.

The Integration Partner task order was modified during the month of March to include the optional Transition Plan deliverable. Integration Partner discussed with FSA the next steps associated with the Transition Plan activities to the new vendor (upon award).

There were no BTIG meetings held for the month of March, as the meeting time continued to be utilized for FSA resources to discuss FSA procurements. Meetings will reconvene during the month of April. Accenture will participate in the following tentatively scheduled meetings for the month of April:

- 4/6: BTIG Roles & Responsibilities, Integration Leadership Support Contract, Integration Planning
- 4/8: Data Strategy, Security Architecture & Access Management
- 4/13: IPM, Front End Business Integration (FEBI), FMS 11i (*FSA Employees Only*)
- 4/15: Data Strategy (CDA), Other Integration Initiatives (*FSA Employees Only*)
- 4/20: Integration Planning (*FSA Employees*)
- 4/22: Integration Planning, FY05 & FY06 Budget Planning (*FSA Employees Only*)
- 4/27: FY05 & FY06 Budget Planning, Risk Management
- 4/29: Enterprise Design Principles

#### Enterprise Risk Management

FSA's BIG continues to identify integration risks among the key integration initiatives. The enterprise integration risks continue to be reviewed and updated; the most recent risks and associated mitigation plans are still being validated among the business owners. Integration risks will continue to be identified, monitored and escalated to Management Council as needed.

Integration Partner project-level risks can be found in the Bi-Weekly Status Reports for the month of March. Refer to the attached March Bi-Weekly Status Reports, Bi-Weekly Status Report 03-15-04.pdf and Bi-Weekly Status Report 03-26-04.pdf.

#### Enterprise Sequencing Plan

Sequencing plans for key integration initiatives must be managed at the program level. Integration Partner maintains the program schedule, the Integrated Master Schedule, which tracks Integration Partner task order start and end dates, major milestones and future projects. Refer to the attached document, Mod Integrated Master Schedule\_040104.pdf, for the current Integration Master Schedule.

Integration Partner also maintains FSA's Integrated FSA Sequencing Plan views, which help to inform planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives. The Enterprise Sequencing Plan was updated in March in preparation for the Management Council discussion on Integration. Refer to the attached document, FSA BIG Sequencing Plan Integration DRAFT 040704 v7.xls, for the current Enterprise Sequencing Plan.

#### Enterprise Gaps

The following synopses summarize any enterprise gaps that may have an effect on FSA's integration program.

- Currently, the specific eZ-Audit staging environment at the VDC is not in synch with production environments and therefore not usable. As a result, any maintenance fixes released into production will not be tested in a production -like environment. Additionally, if the environment is not available in time for the eZ-Audit Release 2.0 in May, the release could be delayed or prone to error.

#### Integration Partner Internal Integration

Integration Partner ensures that key integration projects and initiatives are integrated throughout the program by providing a formal venue for integration leads to meet and share knowledge as it relates to project status, impacts, dependencies and deliverables.

#### Transition Activities

Integration Partner will be transitioning Integration activities to a new vendor; the anticipated award date is April 30. Integration Partner and FSA met in March to discuss transition activities and other next steps in preparation for submission of the draft Transition Plan deliverable in April.

### Integration Efforts Planned for April 2004

The Integration Partner will focus on further developing the following integration areas: Application & Delivery, Data Strategy and Integrated Partner Management.

#### **Application & Delivery**

- COD will continue to move forward with the development activities related to Release 3.1. Release 4.0 requirements sessions will also continue.

#### **Enterprise Data Strategy**

- Continue progress on the Data Quality, CSB Impact Analysis, FFEL/Student Enrollment Options, Web Portals/Shared Services and CDA Operating Guidelines efforts.

#### **Integrated Partner Management**

- There will be no activity under the IPM Gap Analysis task order, as the task order period of performance concluded in March.
- eZ-Audit will continue to move forward with Release 2.0 activities.
- The Identity and Access Management team will continue to move forward with the Identity and Access Management prototype integration efforts.

#### **Integration & Transition Support**

- Integration Partner will continue to manage the enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities.
- Integration Partner will continue to manage enterprise integration risks.
- Integration Partner will continue to provide due diligence in support of FSA's Integration recompetes effort, to include transition activities upon the award of the new vendor.
- Integration Partner will continue to work with the BTIG to reshape current enterprise business objectives, in an effort to update FSA's Vision Framework.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status for the upcoming weeks. Refer to the attached March Bi-Weekly Status Reports, Bi-Weekly Status Report 03-15-04.pdf and Bi-Weekly Status Report 03-26-04.pdf.